



## “Thinking in New Dimensions: The Benefits of Multichannel Capture”

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by Hyland

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## About the White Paper

As the non-profit association dedicated to nurturing, growing and supporting the user and supplier communities of ECM (Enterprise Content Management) and Social Business Systems, AIIM is proud to provide this research at no charge. In this way the entire community can take full advantage of the education, thought-leadership and direction provided by our work. Our objective is to present the "wisdom of the crowds" based on our 190,000+-strong community.

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## Process used and survey demographics

The survey results quoted in this report are taken from a variety of industry reports released by AIIM, collected from individual members of the AIIM community surveyed using a web-based tool. Invitations to take the survey were sent via email to a selection of AIIM's 190,000+ registered individuals.



## About AIIM

AIIM has been an advocate and supporter of information professionals for nearly 70 years. The association mission is to ensure that information professionals understand the current and future challenges of managing information assets in an era of social, mobile, cloud and big data. AIIM builds on a strong heritage of research and member service. Today, AIIM is a global, non-profit organization that provides independent research, education and certification programs to information professionals. AIIM represents the entire information management community: practitioners, technology suppliers, integrators and consultants. AIIM runs training programs, which can be found at <http://www.aiim.org/Training>.



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## About the author

Bob Larrivee is Vice President of Market Intelligence at AIIM, and an internationally recognized subject matter expert and thought leader with over thirty years of experience in the fields of information and process management. Bob is an avid techie with a focus on process improvement, and the application of advanced technologies to enhance and automate business operations.

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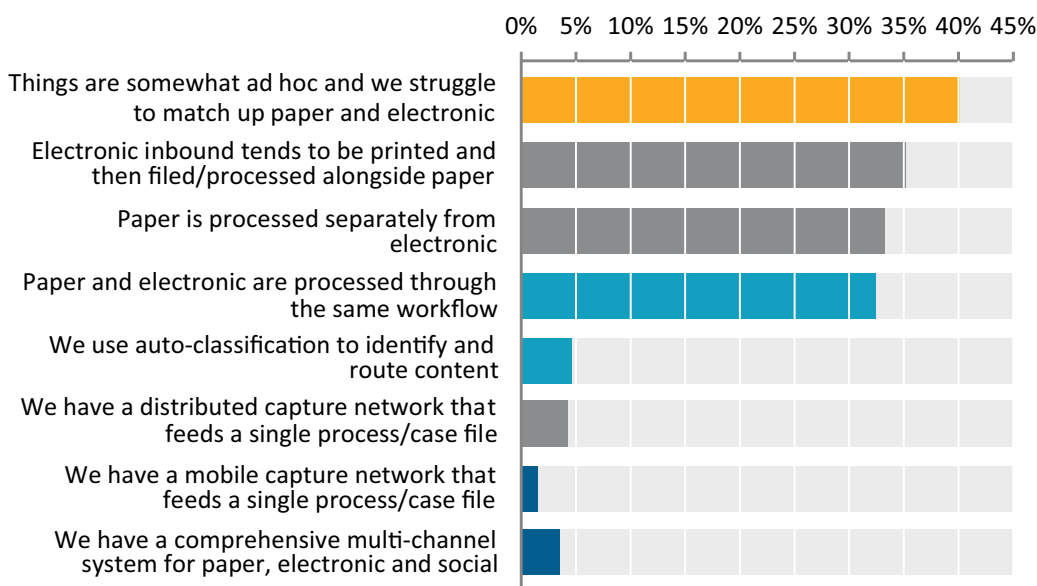
## Introduction

Businesses must extend their processes beyond the traditional walls to include support of multi-channel input, remote workers, external partners, and their customers. Success is reliant on moving away from working at the speed of paper to managing information and business critical content in digital form. This means that paper-based information must be captured – at first touch point whenever and wherever possible, and integrated into end-to-end business processes.

What I am talking about here is the need for organizations to think multidimensional and adopt a multi-channel capture approach. By approaching capture in this way, you are addressing not only scanned documents but also emails, voice, video and all of the ways information is received and captured today, using a range of devices that includes mobile.

This is an area of great opportunity for many organizations. Recent AIIM research finds that 40% of those polled are dealing with multi-channel inbound content in an adhoc manner between paper and electronic information. 36% indicate they print their electronic inbound information and process it as paper. This of course slows operational processes and increases the risk factor for loss of information and unauthorized access substantially. (Figure 1)

**Figure 1. How do you deal with multi-channel inbound content?<sup>1</sup>**



Ideally, multi-channel in-bound would be automated, thereby extracting, validating and interpreting inbound data. Our research finds that only 3% have a comprehensive approach to multi-channel inbound content across paper, electronic and social content. The benefit gained from this approach can be seen in cost reduction, improvements in productivity, improved customer satisfaction, greater accuracy of information, and better governance and compliance.

**When coupled with the flexibility offered through outsourced capture services, mobile device use, and cloud services, businesses are able to:**

- Better utilize their information assets
- Provide a single point of access to vital business information
- Automate manual data capture processes



- Improve workforce engagement and interaction at all levels
- Increase internal and external collaboration capabilities
- Access information across the enterprise regardless of location



## Single Platform as an Advantage

An ideal scenario follows like this: multichannel capture funnels all content—incoming or outgoing—to a central, ordered hub irrespective of source device, location, or type of content.



For example, IT web assets uploaded to the on-site company database are captured in the same fashion as a remote worker's word document, or a graphic designer's newly minted logo emailed via a smartphone while on a business trip. This section will be a discussion on how single platform multichannel capture can best emulate the ease of use, consistency, and standardization of this ideal depiction of the capture process, and outline what positives this brings to an organization.



## Only the Beginning

Capture is an essential element of modern business processes, but it is not the only priority. There are a lot of equally essential technologies that can be applied to business critical processes, including capture. As such, capture requirements need to be defined and aligned to an organization's day-to-day operation. Applying a multidimensional approach to enhance capture processes, organizations are able to leverage mobile, the cloud, multichannel capture, and outsourced vendor services, extending their improvements to all aspects of the enterprise. This includes partnering with a proven third-party provider for outsourced services when and where it is applicable.

**When multi-channel capture is coupled with the flexibility offered through outsourced capture services, mobile device use, and cloud services, businesses are able to:**

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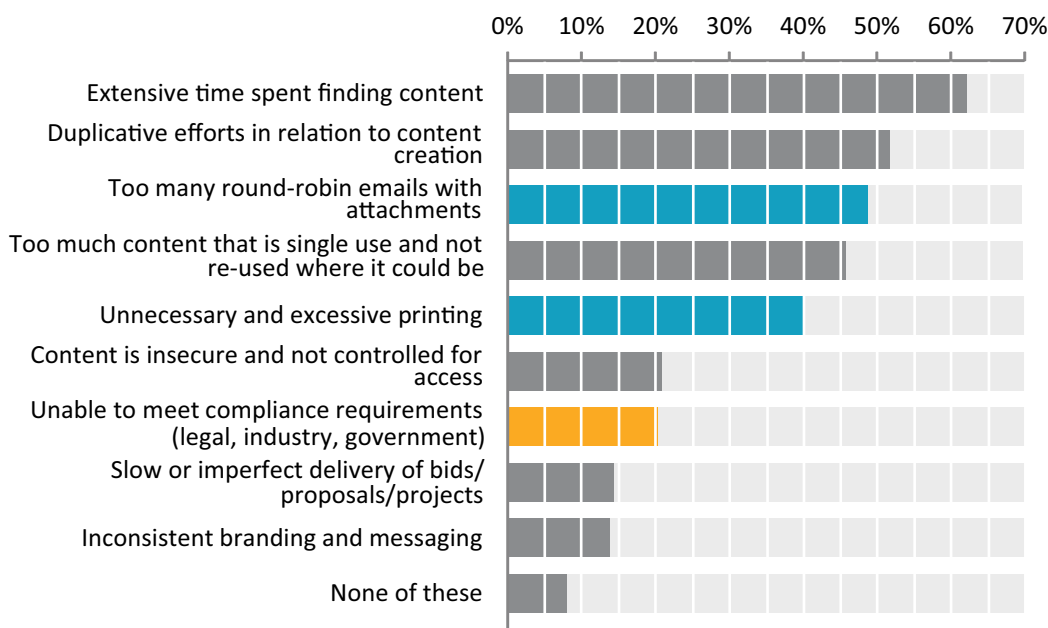


## Opportunities

Opportunity can most easily be found by identifying an operational pain point and the underlying reason for this pain point. For example, if difficulty in finding information is a top pain point in the organization, the question to ask is what makes it difficult to find? Perhaps it resides in a siloed repository, or it has not been classified correctly. Whatever the reason, here lies your opportunity to improve and automate if possible.

AIIM research finds that for the majority of respondents, an extensive amount of time is spent searching for content, as is the duplicative efforts of content creation. (Figure 2) The opportunity here is content creation with the intent to repurpose and classify in alignment with cross-departmental needs. Implementing capture at the earliest stage of the information lifecycle, the point of creation, categorizing it, and storing it into a central repository enables immediate access to all relevant parties. When incorporating capture with automated workflow, the capture of information triggers the workflow or notification process, reducing the amount of time spent searching for information and decreasing overall processing times.

**Figure 2: Does your organization experience any of the following issues related to poor content management practices? <sup>3</sup>**



## New Dimensions

The way we do business is changing. The way we email, communicate, collaborate, or capture our content, all of it is changing; we are in a new dimension of information management. Yes, it is one of change, but at the same time, one of exciting opportunities.

Multichannel content capture, automation, and outsourced vendor services are proving vital for organizational efficiency and agility. Gone are the days when a singular approach is considered the best approach. Capture at the first touch point of information provides the agility and control today's business requires in order to be responsive to their customers' needs. In short, the organization that can provide for many different clients' needs while maintaining seamless interaction across the enterprise becomes the organization of choice.

Organizations must now think multi-dimensionally when addressing capture and access to their information. Consideration must be given to the type of information in question, how it is captured, when it is captured, and just as importantly, where it is captured. This could be through a centralized facility, in field offices, and even in the field through the use of mobile devices.



## Conclusion and Recommendations

Modern business has a tradition steeped in paper. At one time, all content in-or-out of the company came through or went out the front door. Paper was simple, and it trafficked on two-lane streets. Today, structured and unstructured content pours into and out of the enterprise from all directions. Single channel capture of legacy paper through document scans are plainly not enough to deal with the changing information capture realities of the present. Capture now exists wherever information flows: whether its online, mobile, in the cloud - on-premise or in an outsourced ECM software - in all these places capture has the express purpose to manage information from a variety of sources including, multi-channel input, remote workers, and external partners and their customers.

To accommodate for the evolving patterns of information capture we must shed our paper legacies to avoid becoming throttled to the speed of paper, and adopt a system of multichannel capture to manage information and business critical content in digital form. To do this, we must ensure that paper-based content is captured, whenever and wherever possible, at first-touch point and then integrated to end-to-end business processes.

Our data has taken on new dimensions, and so too must our capture systems. We must approach the capture of emails, voice, video recordings, scanned documents, cloud based content, mobile content, and all the disparate angles of entry from which content enters and exits the organization with multidimensional thinking and multichannel capture solutions.

To harness the power of data is no easy task, but it is one that is inextricably linked to the way forward. Connectivity begets further connectivity. The cloud only gets bigger. Mobile access only becomes more mobile. It is not just technology—it is a mindset, and it begins with a multidimensional approach to business processes in a digital era. Everything is connected; we must be connected as well.



## Recommendations

- Map and document operational processes along with the information related to those processes
- Identify the first touch point of relevant information and seek ways to capture it further upstream
- Analyze where multichannel capture, mobile/cloud services, and outsourcing could be of benefit
- Automate the capture process through use of recognition and auto-classification technologies
- Work toward a level of standardization, and consistency across the enterprise

## References

- <sup>1</sup> AIIM Industry Watch titled “Paper-Free Progress: measuring outcomes”
- <sup>2</sup> AIIM Industry Watch titled “ECM Decisions – strategic options for managing, accessing and preserving content”
- <sup>3</sup> AIIM Industry Watch titled “Information Management - State of the Industry 2016”

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OnBase by Hyland is a single enterprise information platform for managing content, processes and cases and has transformed thousands of organizations worldwide by empowering them to become more agile, efficient and effective.

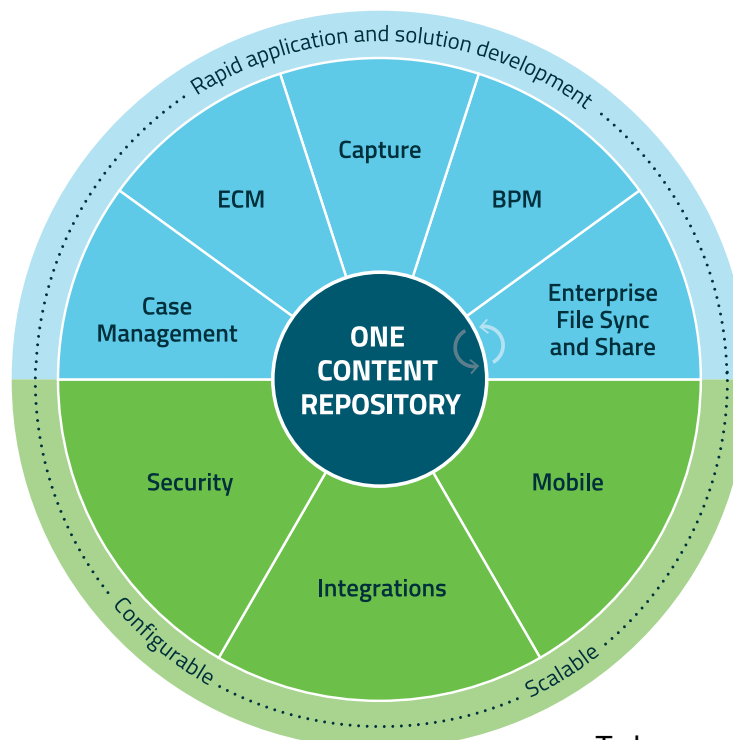
### **Provide faster, improved access to content**

With an extensive array of capture options, OnBase empowers you to capture all of your information, in any format, no matter how it enters your organization. OnBase provides direct email integrations, mobile content capture, data stream import, scanner integrations, electronic forms functionality and more. Advanced data capture capabilities automatically classify incoming documents, extract and validate important information, and share that information with other systems. Hyland, creator of OnBase, also offers outsourced document scanning and indexing services to help you meet all your capture requirements with a single vendor.

### **One platform, unlimited potential**

In addition to robust multi-channel capture, OnBase is a market leader in enterprise content management; an award-winning and analyst-recognized case management platform; and includes a powerful and highly configurable workflow engine. Every solution can be deployed in the cloud, extended to mobile devices and integrated with any existing business application. Enterprise file sync and share (EFSS) for the OnBase platform is available with Hyland's complementary offering, ShareBase.

By combining all these capabilities on one highly configurable and scalable platform, OnBase supports an unlimited number of solutions across your organization.



To learn more, visit [OnBase.com](http://OnBase.com).





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